

METROPOLITAN WASHINGTON, D.C.



AREA LABOR SUMMARY

THE D.C. DEPARTMENT OF EMPLOYMENT SERVICES <X><X>

DATA FOR MARCH 1990

MAY 1990

D.C. Unemployment Edges Down To 5.6%

Area Job Creation Slows To 1.8%—The Lowest Rate In Over Six Years

Labor Force

The District's unemployment rate in March dipped a slight tenth of a percentage point to 5.6 percent. Only twice in the past 18 years (March 1988 and March 1989) has the March rate in the District been lower.

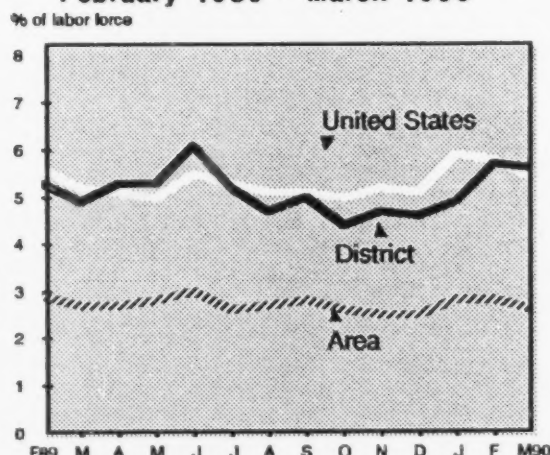
In both the suburbs and the Area, the March rate also declined. In the suburbs, the drop was from 2.4 percent in February to 2.1 percent in March. In the Area, the decline was from 2.8 percent in February to 2.6 percent in March. Both relatively low rates for March.

The seasonally unadjusted unemployment rate for all workers in the United States in March was 5.4 percent. March represents the first time in the past nine months that the District's rate has been above that for the nation.

The District

Labor market changes in the District between February and March were unusually small for this time of year. Just 200 new workers joined the labor force. Local employers hired 500 workers,

Unemployment Rates
February 1989 - March 1990



thus, job expansions absorbed the small increase in new workers and drew 200 additional idle workers from the jobless rolls.

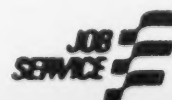
As has been the pattern for several months, the over-the-year comparison (March 1989 to March 1990) shows a relatively large decline in both the District's Labor Force (10,700 or 3.4 percent) and employed residents (12,400 or 4.1 percent). In addition to the declining labor force and

Continued on page 3



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District of Columbia

Marion Barry, Jr., Mayor



Department of
Employment Services
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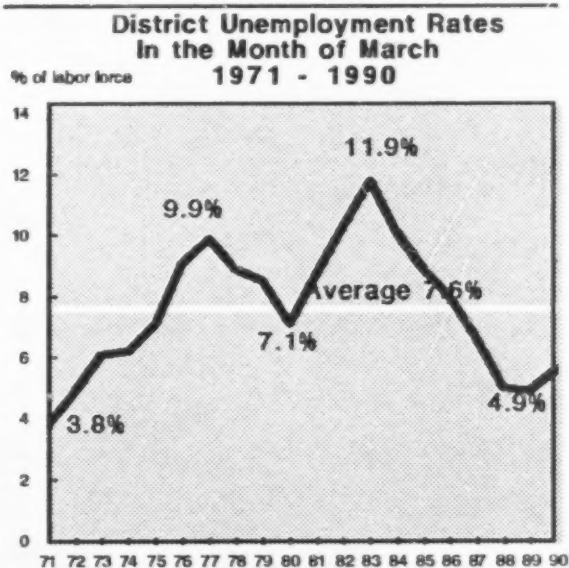
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The *Area Labor Summary* is published monthly by the D.C. Department of Employment Services, 500 C Street, N.W., Washington, D.C. 20001. The Labor Market Information and Research Staff (Richard Groner, Chief) prepares the *Summary*. The following staff members have contributed to the publication and development of data herein: Charles Roeslin, Rufus Daniels, Eileen Dent, Nancy Anderson-Grant, Elsie Taylor, and Gwendolyn Thompson, and administrative support was provided by Robin McDonald.

Inquiries and requests for labor market information may be obtained by writing to the above address, or by calling: (202) 639-1641 or 639-1542.

Continued from page 1

employment, there were 1,600 more residents on the unemployment roster this March than in March 1989. As a result of the large decline in the labor force and the increase in jobless residents, the City's unemployment rate rose a significant seven-tenths of a percentage point when compared to March of last year. This was the first year since 1983 that both the March level of unemployment and the unemployment rate increased over the year. The labor market statistics during the first quarter of 1990 seem to be indicating a basic upward shift in the District's unemployment rate. Still at 5.6 percent, the rate is substantially below the long-term March average of 7.6 percent.



The Area & Suburbs

Unlike in the District, the basic over-the-year changes in the suburban labor force are still contributing to a downward turn in the unemployment rate. Between last March and this March, 42,000 additional suburbanites joined the labor force. As has been the case for many months, local employers have hired a greater number of workers over the year than have entered the labor force. Between March 1989 and March 1990, 44,700 more suburban workers found jobs. This was 2,700 more than the number who

entered the labor force. As a result, suburban unemployment rolls declined and the unemployment rate dropped over the year by two-tenths of a percentage point to a very low 2.1 percent. Thus, the suburban market for workers continued to tighten.

Because the size of the suburban portion of the Area's labor market is so much larger than the District's the increasing unemployment in the City had only a small impact on the market for the total Washington Area. As in the suburbs, the Area's employment expansion over the year was greater than its increase in the labor supply. Between March 1989 and March 1990, 31,300 new Area workers entered the job market, but a larger 32,300 were hired, dropping the level of unemployment by 1,000 and reducing the unemployment rate by a modest tenth of a percent. At 2.6 percent of the labor force, unemployment in the Washington Area is the lowest of any major metropolitan area in the nation. Thus, despite a marked slowing of new job creation in the Washington Area, unemployment remains very low and the labor markets very tight.

Unemployment Rates in the Washington, D.C., MSA by City and County

	Mar.a/ 1990	Feb.b/ 1990	Mar.b/ 1989
District of Columbia	5.6	5.7	4.9
Stafford County	3.2	3.7	2.1
Frederick County	3.1	4.2	3.4
Calvert County	3.0	3.6	4.2
Prince Georges County	2.7	2.9	3.1
Alexandria City	2.6	2.6	2.4
Prince William County	2.2	2.4	2.0
Charles County	2.2	2.5	2.8
Manassas City	2.1	2.7	1.6
Manassas Park City	1.9	2.4	1.4
Arlington County	1.9	2.1	2.1
Montgomery County	1.8	2.0	2.2
Fairfax County	1.7	1.9	1.7
Loudoun County	1.6	1.9	1.6
Fairfax City	1.6	1.9	1.7
Falls Church City	1.3	1.4	2.0

a/ Preliminary

b/ Revised

SOURCE: The Department of Employment Services, the Maryland Department of Economic and Employment Development, and the Virginia Employment Commission

Employment Status for the Civilian Population
District of Columbia, Suburban Ring, and the Washington, D.C. MSA
March 1990^{a/}

	Mar.b/ 1990	Feb.c/ 1990	Mar.d/ 1989	Feb.d/ 1989	Net Charge From	
					Feb.c/ 1990	Mar. 1989
Washington, D.C.						
Civilian Labor Force	304,400	304,200	315,100	317,700	200	-10,700
Total Employed	287,400	286,900	299,800	300,900	500	-12,400
Total Unemployed	17,000	17,200	15,400	16,900	-200	1,600
Unemployment Rate ^{e/}	5.6	5.7	4.9	5.3	-0.1	0.7
Suburban Ring						
Civilian Labor Force	1,916,300	1,903,200	1,874,300	1,860,300	13,100	42,000
Total Employed	1,875,600	1,857,900	1,830,900	1,814,100	17,700	44,700
Total Unemployed	40,700	45,400	43,300	46,100	-4,700	-2,600
Unemployment Rate ^{e/}	2.1	2.4	2.3	2.5	-0.3	-0.2
Washington, D.C. MSA						
Civilian Labor Force	2,220,700	2,207,400	2,189,400	2,178,000	13,300	31,300
Total Employed	2,163,000	2,144,800	2,130,700	2,115,000	18,200	32,300
Total Unemployed	57,700	62,600	58,700	63,000	-4,900	-1,000
Unemployment Rate ^{e/}	2.6	2.8	2.7	2.9	-0.2	-0.1

a Detail may not add to the totals due to independent rounding. b. Preliminary. c. Revised.
d. Data reflects Benchmark Revisions e. Seasonally unadjusted.

Estimated Labor Force and Employment for the Washington Metropolitan Area includes the District of Columbia; the Virginia cities of Alexandria, Fairfax, Falls Church, Manassas and Manassas Park; the Virginia Counties of Fairfax, Arlington, Prince William, Loudoun, and Stafford; and the Maryland Counties of Montgomery, Prince Georges, Charles, Frederick, and Calvert.

Source: Prepared by the Department of Employment Services, Labor Market Information and Research Staff in cooperation with the Virginia Employment Commission, the Maryland Department of Economic and Employment Development, and the U.S. Bureau of Labor Statistics.

**Characteristics of the
Insured Unemployed**

The number of individuals receiving unemployment insurance (UI) benefits in the District of Columbia totaled 8,392 in March 1990 down 1,499 claimants from February. In March, 56 percent of all UI claimants were males. Occupationally, professional, technical and managerial workers and clerical and sales workers accounted for 24 percent each of the total claimants. This was followed by service workers recording 20 percent.

The median duration of the current spell of insured unemployment was 10.0 weeks for all claimants in March. Over the month, the duration for males rose from 9.5 weeks to 10.0 weeks. For females, the duration increased from 10.0 weeks to 10.1 weeks. In March 1989, the average duration for males was 9.9 weeks and for females 10.0 weeks.

Labor Force Distribution
Washington Metropolitan Area
March 1990 & March 1989
(percent)

	Labor Force	Employed March 1990	Unemployed
Area	100.0	100.0	100.0
District	13.7	13.3	29.4
Suburbs	86.3	86.7	70.6
		March 1989	
Area	100.0	100.0	100.0
District	14.4	14.1	26.2
Suburbs	85.6	85.9	73.8

Job Growth

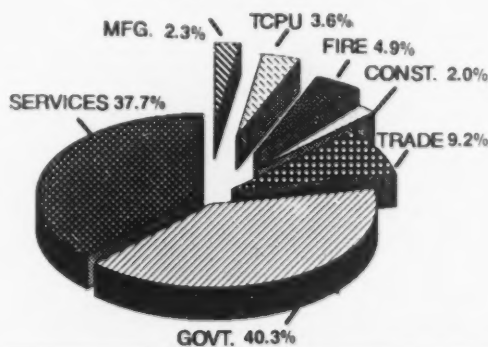
The District

The number of jobs in the District increased by 5,100 for a gain of 0.7 percent between February and March. The private sector accounted for three-fourths of the growth with gains in Services (2,600 jobs) and Trade (700 jobs). A seasonal gain in Educational Services (900 jobs) was responsible for a substantial portion of the gain in Services while Wholesale Trade (400 jobs) accounted for a majority of the Trade growth.

The public sector increased by 1,300 with growth in both Federal Government (600 jobs) and State and Local Government (700 jobs). Over the year (March 1989 to March 1990), the number of District jobs increased 1.8 percent for a gain of 12,200 jobs. **The private sector grew at a rate of 2.5 percent, generating 10,100 jobs and accounting for 83 percent of total growth.** The leading job producer, Services, contributed 8,600 jobs and accounted for 70 percent of all new jobs. The major components of Services growth were Legal Services (2,000 jobs), Engineering and Management Services (1,600 jobs), Business Services (1,000 jobs) and Health Services (1,000 jobs).

The public sector grew at a rate of 0.8 percent with gains in both Federal Government (1,500 jobs) and State and Local Government (600 jobs).

**Distribution of District Jobs
March 1990**



The Suburbs

The number of suburban jobs increased 0.5 percent for a gain of 7,800 jobs between February and March. The private sector accounted for 91 percent of the gain with growth primarily in Services (5,000 jobs). The Virginia suburbs were responsible for 63 percent of the Services growth.

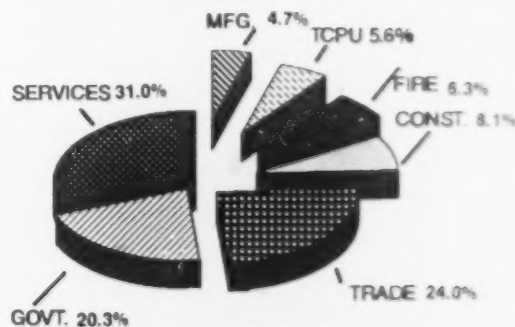
The public sector increased by 700 jobs with gains in State and Local Government (900 jobs) partially offset by a loss in Federal Government (200 jobs). Two-thirds of the State and Local increase and all of the Federal decline occurred in the Virginia suburbs.

Over the year (March 1989 to March 1990), suburban jobs grew at a rate of 1.8 percent for a gain of 28,000 jobs. **The Virginia suburbs grew at a rate of 2.3 percent, accounting for 62 percent of suburban growth while the Maryland suburbs increased at a rate of 1.4 percent.**

The private sector accounted for 65 percent of all new suburban jobs with the primary job producers, Services (10,100 jobs) and Trade (7,600 jobs), responsible for 96 percent of private sector growth. Sixty-nine percent of the growth in these two industries occurred in the Virginia suburbs. The Virginia suburbs were also responsible for 89 percent of the growth in Finance, Insurance and Real Estate (3,000 jobs) and Transportation, Communications, and Public Utilities (1,500 jobs) as well as all of the decline in Construction (4,200 jobs).

In the public sector, gains in both State and Local Government (6,700 jobs) and Federal Government (3,000 jobs) resulted in growth over the year of 3.2 percent.

**Distribution of Suburban Jobs
March 1990**



Continued from page 5

The Area

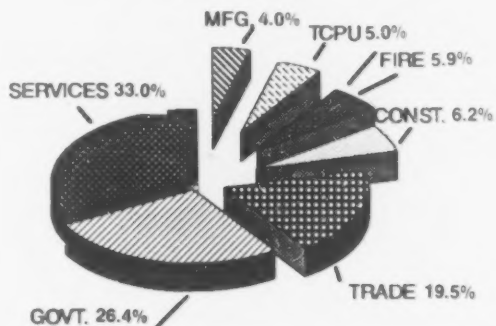
The Washington Metropolitan Area gained 12,900 jobs between February and March for an increase of 0.6 percent. The private sector was responsible for 85 percent of the increase with gains in Services (7,600 jobs) and Trade (1,200 jobs).

The public sector grew by 0.3 percent with gains in both State and Local Government (1,600 jobs) and Federal Government (400 jobs).

Over the year (March 1989 to March 1990), the Area grew at a rate of 1.8 percent for a gain of 40,200 jobs. The private sector grew at a rate of 1.8 percent, generating 28,400 jobs and producing 71 percent of all new area jobs. The leading job contributor, Services (18,700 jobs), was responsible for two-thirds of all new private sector jobs. Significant private sector growth was also generated by Trade (8,700 jobs), Finance, Insurance, and Real Estate (2,800 jobs) and Transportation, Communications, and Public Utilities (1,500 jobs). Construction, on the other hand, declined by 2.7 percent for a loss of 3,900 jobs.

The public sector grew at a rate of 2.0 percent with growth of 3.3 percent in State and Local Government (7,300 jobs) and 1.2 percent in Federal Government (4,500 jobs).

**Distribution of Area Jobs
March 1990**



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Wage and Salary Employment by Industry and Place of Work^{a/}
(in thousands)

INDUSTRY	District of Columbia			Metropolitan Area		
	Mar.b/ 1990	Feb.c/ 1990	Mar.c/ 1989	Mar.b/ 1990	Feb.c/ 1990	Mar.c/ 1989
TOTAL	688.6	683.5	676.4	2,243.9	2,231.0	2,203.7
Total Private Sector	411.2	407.4	401.1	1,650.8	1,639.9	1,622.4
Total Government	277.4	276.1	275.3	593.1	591.1	581.3
Total Goods Producing	30.2	30.0	29.6	229.7	228.5	233.0
Manufacturing	16.1	16.0	15.8	89.3	89.1	88.8
Total Durables	2.4	2.3	2.4	43.0	43.1	43.5
Stone, Clay, Glass Products	N/A	N/A	N/A	3.2	3.2	3.3
Electronic & Electric Equip.	N/A	N/A	N/A	17.2	17.3	17.3
All Other Durable	N/A	N/A	N/A	22.6	22.6	22.9
Total Non-Durable	13.7	13.7	13.4	46.3	46.0	45.3
Food & Kindred Products	0.3	0.3	0.3	4.7	4.6	4.5
Printing & Publishing	13.0	13.0	12.7	35.8	35.5	34.9
All Other Non-Durable	0.4	0.4	0.4	5.8	5.9	5.9
Mining	0.1	0.1	0.1	1.1	1.1	1.0
Construction	14.0	13.9	13.7	139.3	138.3	143.2
Total Service Producing	658.4	653.5	646.8	2014.2	2002.5	1970.7
Transportation, Communications & Public Utilities	24.6	24.6	24.6	110.9	110.8	109.4
All Transportation	9.6	9.7	9.4	56.0	56.0	53.7
Railroads	4.1	4.1	4.0	5.3	5.3	5.2
Transportation ex. Railroad	5.5	5.6	5.4	50.7	50.7	48.5
Communications & Public Utilities	15.0	14.9	15.2	54.9	54.8	55.7
Trade	63.5	62.8	62.4	437.4	436.2	428.7
Wholesale	8.5	8.1	8.3	77.7	77.5	77.4
Retail	55.0	54.7	54.1	359.7	358.7	351.3
General Merchandise	N/A	N/A	N/A	39.4	39.9	38.6
Food Stores	N/A	N/A	N/A	52.1	52.2	47.9
Automotive	N/A	N/A	N/A	38.3	38.2	39.0
Apparel & Accessories	N/A	N/A	N/A	26.9	27.2	27.4
Eating & Drinking Places	27.6	27.3	27.0	116.1	115.1	114.1
All Other Retail	27.4	27.4	27.1	86.9	86.1	84.3
Finance, Insurance & Real Estate	33.4	33.1	33.6	131.5	130.7	128.7
Finance	15.8	15.7	16.1	61.3	61.0	59.2
Depository Institutions	9.1	9.0	9.3	40.4	40.2	38.3
Other Finance	6.7	6.7	6.8	20.9	20.8	20.9
Insurance	7.7	7.6	7.6	26.8	26.6	26.7
Real Estate	9.9	9.8	9.9	43.4	43.1	42.8
Services	259.5	256.9	250.9	741.3	733.7	722.6
Hotels & Other Lodging Places	16.9	16.7	16.2	36.8	36.1	35.5
Personal Services	3.6	3.6	3.7	24.3	23.6	23.5

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Wage and Salary Employment by Industry and Place of Work^a (in thousands)

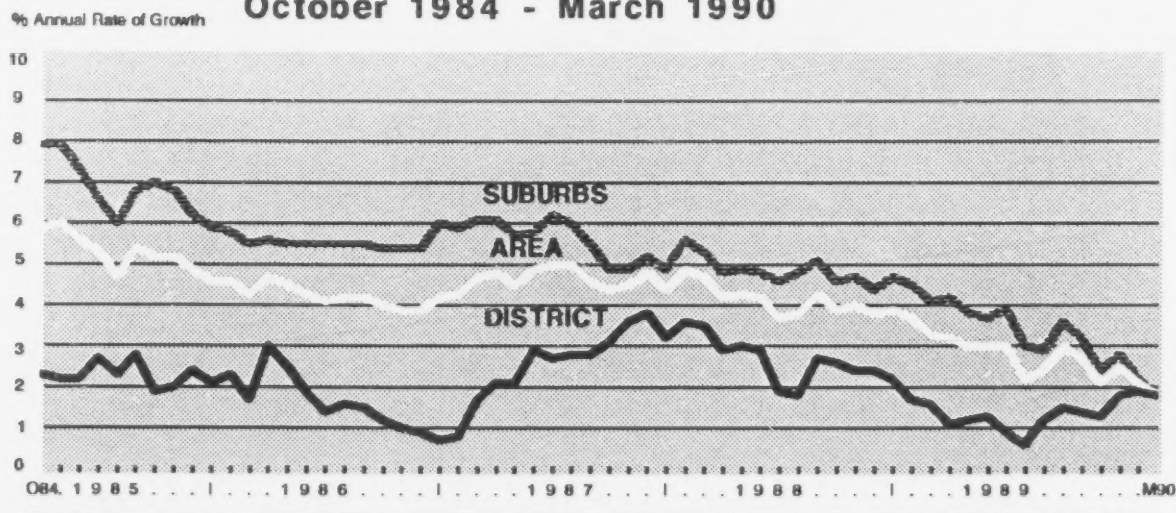
INDUSTRY	District of Columbia			Metropolitan Area		
	Mar.b/ 1990	Feb.c/ 1990	Mar.c/ 1989	Mar.b/ 1990	Feb.c/ 1990	Mar.c/ 1989
Business Services	40.1	39.6	39.1	180.4	178.4	176.7
Services to Buildings	15.3	15.1	15.0	N/A	N/A	N/A
Personnel Supply	8.9	8.6	8.6	N/A	N/A	N/A
Computer & Data Process	6.1	6.1	5.7	N/A	N/A	N/A
Other Business Services	9.8	9.8	9.8	N/A	N/A	N/A
Health Services	37.6	37.3	36.6	114.3	113.3	110.8
Legal Services	30.1	30.0	28.1	40.9	40.7	38.3
Educational Services	31.2	30.3	30.9	44.9	44.0	44.3
Social Services	12.2	12.1	11.4	33.7	33.5	32.3
Membership Organizations	33.7	33.3	32.8	59.9	59.2	58.3
Engineering/Management Ser.	43.9	43.7	42.3	145.0	145.4	143.7
All Other Services	10.2	10.3	9.8	61.1	59.5	59.2
Government	277.4	276.1	275.3	593.1	591.1	581.3
Federal Government	220.2	219.6	218.7	366.0	365.6	361.5
State & Local Government	57.2	56.5	56.6	227.1	225.5	219.8
State Government	52.4	51.7	51.9	83.5	82.4	82.0
Local Government	N/A	N/A	N/A	143.6	143.1	137.8
Public Transportation	4.8	4.8	4.7	N/A	N/A	N/A

a. Detail may not add to totals due to independent rounding. b. Preliminary. c. Revised.

Data includes all full- and part-time employees who worked during or received pay for any part of the pay period which includes the 12th of the month. Proprietors, self-employed, unpaid family workers, and private household workers are excluded.

Source: Prepared by the Department of Employment Services, Labor Market Information and Research Staff in cooperation with the Virginia Employment Commission, the Maryland Department of Economic and Employment Development, and the U.S. Bureau of Labor Statistics.

Monthly Over-The-Year Rate of Job Growth October 1984 - March 1990



Area Job Growth Rates

Over the past 65 months, (October 1984 to March 1990), the Washington Area created new jobs at a rate of 4.3 percent. Measured by monthly over-the-year changes, however, the rate of growth has been steadily declining after peaking at 6.8 percent in December 1984. Between March 1989 and March 1990, the Area's job growth slowed to 1.8 percent. The over-the-year rate of this past March was much smaller than the 3.3 percent recorded in March of last year. In fact, this March's growth rate is the lowest over-the-year growth in all of the 65 months in the local job growth series.

The local job growth rates in March were exactly the same (1.8 percent) for all three geographic areas (the District, the suburbs and the Area). Like in the Area, the 1.8 percent suburban growth rate was the lowest over-the-month growth in the past 65 months. The suburban growth was down significantly from the 4.1 percent registered a year ago in March 1989. **Only in the District did the 1.8 percent growth for this March exceed growth (1.6 percent) in March 1989.**

In absolute terms, job creation in the Area has declined from 111,200 new jobs produced between March 1984 and March 1985, to 40,200 between March 1989 and March 1990. Over the past year, 28,000 new jobs were added to the Suburban economy and 12,200 in the District. **The Washington Area is now creating new jobs at a slower pace than the U.S. economy (1.8 percent vs. 2.3 percent for the U.S. economy).** This is the second consecutive month that the local job growth rate has been below the U.S. rate.

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- Resume Bank
- Labor Market Information



Profile of Job Growth Rates October 1984 to March 1990

The Area

Average 65 months	4.3%
High, December 1984	6.8%
Low, March 1990	1.8%
1-year ago	3.3%
Current month	1.8%

The Suburbs

Average 65 months	5.4%
High, January 1985	8.4%
Low, March 1990	1.8%
1-year ago	4.5%
Current month	1.8%

The District

Average 65 months	2.2%
High, October 1984	4.4%
Low, August 1989	0.6%
1-year ago	1.6%
Current month	1.8%

NOTE: Data reflects benchmark revisions for 1988-1989.

INDUSTRIAL PROFILE:

Washington Area Construction Jobs—1949-1989

Total Job growth in the Washington Area has declined to the lowest levels in over seven years. In 1989, the Washington Area recorded an annual average of 2.9 percent for job growth. Monthly over-the-year measurements seem to indicate that total job growth continued to decline through the first quarter of 1990. In addition, local newspapers have published many articles indicating that the local construction and related businesses are beginning to show signs of real market weakness.

As background for understanding the slowing of growth in the Construction industry, this Profile examines employment in the Washington Area's Construction industry over a period of 40 years and compares the long-term industry patterns to total job growth in the Area, to job growth nationally, and job growth in the U.S. Construction industry. The study also explores the relationship of job growth to national swings in the business cycle. Data used is Non-Agricultural Wage and Salary Employment by Place of Work, commonly referred to as "jobs from the establishment survey." All job totals are annual averages.

40 Year Washington Area Job Growth

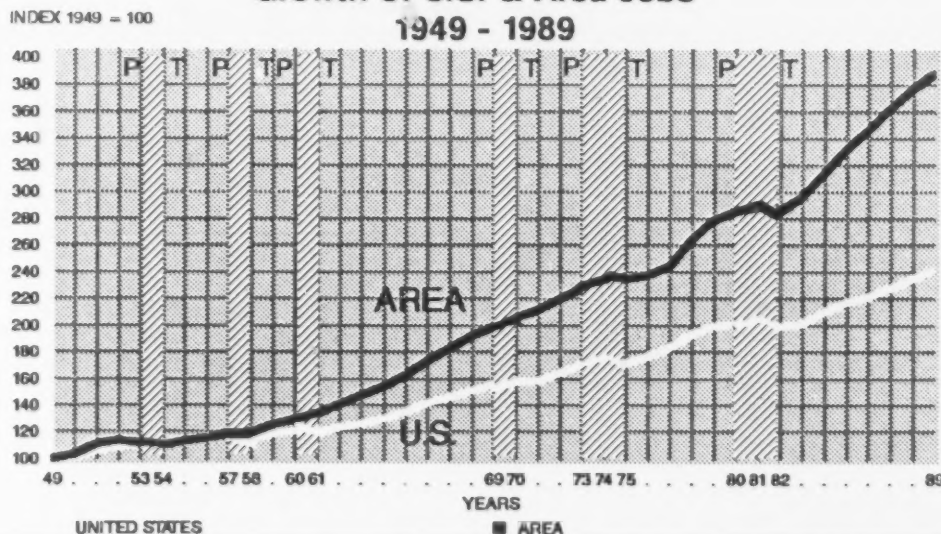
In the last four decades, the Washington Area has produced 1,655,900 jobs—an increase of 288.0 percent. During the same period, the total U.S. jobs grew by 142.0 percent, or only half as rapidly as jobs in the local market. **So over this long period, the local economy has clearly out-paced the national economy in the rate at which it produces new jobs.**

Viewed in ten-year increments, national and local job growth falls into the following distribution:

	United States Growth	%	Washington Area Growth	
1950-1960	8,972.0	19.9	153.3	25.9
1960-1970	16,691.0	30.8	438.9	58.9
1970-1980	19,526.0	27.5	453.3	38.3
1980-1989	18,175.0	20.1	521.4	36.2

The 1960's represented the period of most rapid job growth in both the nation and the Washington Area. The most productive period

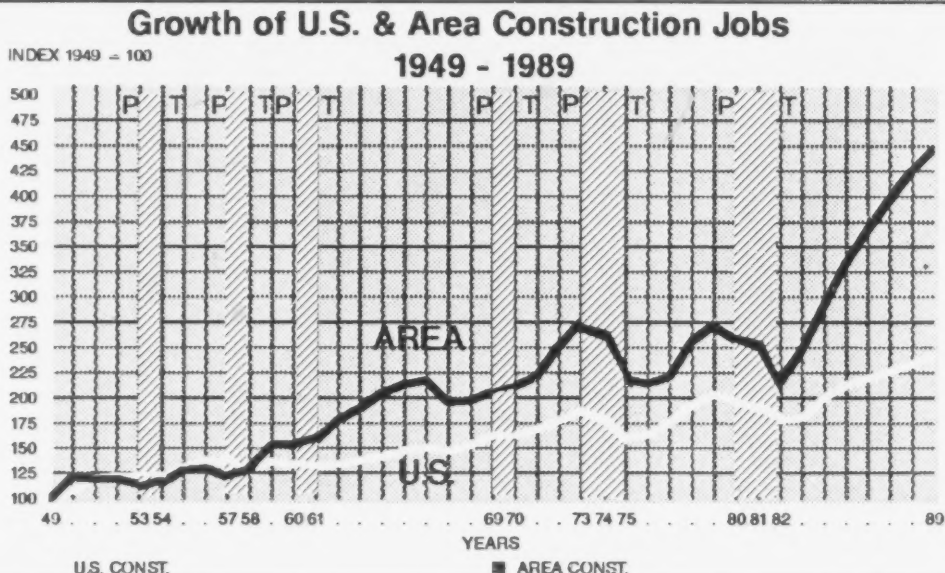
The historical data series for jobs in the Washington Area began in 1949, the starting point for this Industry Profile.

Growth of U.S. & Area Jobs
1949 - 1989

Continued from page 10

locally in terms of absolute job growth, however occurred in the past nine years when the local economy added more than a half a million new jobs. Interestingly, during the first nine years of the 1980's the Washington Area created over 3 percent of all the new jobs in the nation. Thus, the Washington Area now contains over 2 percent of all the jobs in the country.

In each decade, local construction jobs have expanded more rapidly than its national counterpart. **But the most outstanding feature of the local construction growth has been the explosion of construction jobs during the 1980's, especially since 1982.** With a growth of 62.6 percent in the last nine years and 107.1 percent in just the past seven years, construction job growth is a clear



40 Years of Job Growth in Construction

Between 1949 and 1989, Construction industry jobs in the Washington Area blossomed from just 33,300 to 148,500—a growth of 346 percent. **Thus, local construction jobs grew at a much more rapid pace than total local jobs (288 percent).** Similar to the pattern for total jobs, the local Construction industry growth also occurred more rapidly than construction jobs for the nation (141.6 percent). Viewed in 10-year increments, construction jobs in the Area and the U.S. show the following growth patterns:

	United States		Washington Area	
	Growth	%	Growth	%
1950-1960	732.0	33.4	17.5	52.6
1960-1970	662.0	22.6	19.6	38.6
1970-1980	718.0	20.3	15.5	22.0
1980-1989	954.0	22.0	62.6	72.8
1982-1989	1,395.0	35.7	76.8	107.1

(Employment change in thousands)

statistical measure of the enormous size and strength of the recent building boom in the Washington Area. This extremely fast growth has probably also been the underlying cause of serious labor shortages in the industry. Similar to the slowing growth for total jobs in the Area, the growth in construction jobs has been slowly declining after reaching a peak of 18.2 percent in 1984 to 5.0 percent last year.

Washington Area Construction Jobs

	Total	Change	%
1982	71.7		
1983	81.9	10.2	12.5
1984	96.8	14.9	18.2
1985	110.9	14.7	15.2
1986	121.9	11.0	9.9
1987	131.6	9.7	7.6
1988	141.4	9.8	7.4
1989	148.5	7.1	5.0

(Employment in thousands)

Continued on page 12

Continued from page 11

Local Job Growth and Business Cycles

Since 1949, there have been seven national recessions (see table).¹ In five of these seven downturns, the U.S. economy lost jobs. On the other hand, the Washington Area lost jobs in only two (1953 and 1982)—21,900 jobs in 1953-1954 recession and 12,000 in 1982. In 1982, however, there was not only a national recession, but also a large layoff of Federal government workers. If the Federal employment cutback had not occurred, the Area economy probably would not have actually lost jobs due to just the impact of the recession.

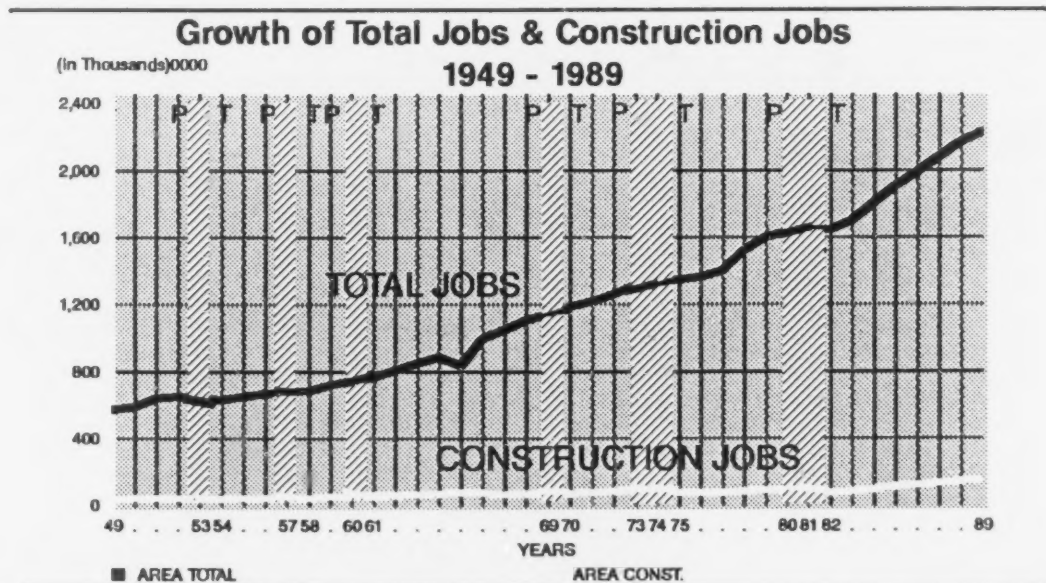
On the other hand, the local Construction industry shows job losses in six of the seven national recessions, the same as the national Construction industry. **Thus, the local construction business demonstrates the same employment sensitivity to downturns in the national economy as national construction.** Local construction also tends to be much more sensitive to general business swings than the overall Washington economy. In fact, the national and local construction industries, recorded negative growth back in 1967, when there were general monetary problems in the economy, but not severe enough to throw the nation into a recession. Conversely, three years later in 1970, there

was a national recession, but neither total jobs nor construction jobs were negatively impacted either in the U.S. or the local economy. Thus, both 1967 and 1970 proved to be exceptions to the traditional cyclical patterns.

The Relationship of Construction Jobs to Total Jobs

Despite its rapid growth over both the long and the short runs, the Construction industry is still a relatively small part of the total job base, both in the nation and in the Washington Area. In 1949, the U.S. Construction industry comprised 4.9 percent of all of the jobs in the nation. In 1989, it held exactly the same position.

In the Washington Area, the Construction industry gained some market share, growing from 5.8 percent in 1949 to 6.7 percent in 1989. **While the Construction industry shows very rapid growth and large cyclical swings, because of its small size, its activity does not produce large employment impacts at the level of the total economy, especially in the Washington Area.** For example, when plotted on a graph showing both absolute employment for total jobs and construction jobs, construction employment is so small when compared to the total that it becomes a straight line at the very bottom of the chart, despite its very rapid growth and wide cyclical swings.



Continued on page 13

Observations

Both the total local economy and its Construction industry have clearly outperformed their national counterparts in terms of relative job creation for a period of 40 years. Local growth over the past seven years has been especially remarkable. The local growth in construction employment also produces an especially good statistical picture of the amazing local building boom that has occurred since the end of the last recession. Rapid job creation is probably the primary reason for the local tight labor market and extremely low unemployment. This is especially true of the labor shortages seen in the construction industry, which saw jobs expand by nearly 77,000, or the doubling of employment in just seven years. Clearly the local boom is beginning to run its course, especially in the Construction industry which seems to have built up excess inventories of some types of housing and office space.

Employment in the local Construction industry demonstrates a strong sensitivity to cyclical swings in the national economy. Thus, it is probably a good indicator of economic conditions over the short run. However, extreme caution must be exercised in using monthly

changes in construction jobs for this purpose. Of all the local industries, construction is the one for which it is most difficult to estimate monthly changes. There are many small employers in construction who frequently move in and out of the market place and there is also difficulty in obtaining a significantly large number of local contractors to participate in the voluntary monthly employment survey.

It is important to recognize that while the Construction industry is highly visible with strong sensitivity to market swings, it is in fact a relatively small industry with a limited impact on the total job market. In contrast for example, the Services industry tends to demonstrate little, if any, impact from downturns in the business cycle, but Services is five times the size of construction and the Washington Area growth leader. Thus, while slow or even negative growth in construction is serious for those firms and people employed in the industry, its impact on the total economy and job market is less serious, and the local economy can remain relatively strong with modest growth, even if the construction component declines.

PERIODS OF RECESSION IN THE UNITED STATES

PEAK		THROUGH
NOV. 1948	TO	OCT. 1949
JUL. 1953	TO	MAY 1954
AUG. 1957	TO	APR. 1958
APR. 1960	TO	FEB. 1961
DEC. 1969	TO	NOV. 1970
NOV. 1973	TO	MAR. 1975
JAN. 1980	TO	JUL. 1980
JUL. 1981	TO	NOV. 1982

SOURCE: U.S. Department of Commerce, Business Conditions Digest, January 1990.

**Total Jobs and Construction Jobs
in the United States & The Washington Metropolitan Area
1949-1989
(in thousands)**

	U.S. TOTAL	AREA TOTAL	U.S. CONST.	AREA CONST.
1949	44,866.0	575.0	2,194.0	33.3
1950	45,197.0	592.4	2,364.0	40.2
1951	47,819.0	639.8	2,637.0	39.8
1952	48,793.0	654.2	2,668.0	39.6
1953	50,202.0	641.4	2,659.0	38.0
1954	48,990.0	632.3	2,646.0	38.2
1955	50,641.0	652.0	2,839.0	42.6
1956	52,369.0	667.2	3,039.0	43.3
1957	52,853.0	677.9	2,962.0	40.4
1958	51,324.0	684.6	2,817.0	43.3
1959	53,268.0	721.8	3,004.0	51.1
1960	54,189.0	745.7	2,926.0	50.8
1961	53,999.0	768.5	2,859.0	52.3
1962	55,549.0	810.7	2,948.0	59.2
1963	56,653.0	849.3	3,010.0	63.1
1964	58,283.0	886.1	3,097.0	68.2
1965	60,765.0	935.3	3,232.0	70.9
1966	63,901.0	999.8	3,317.0	72.3
1967	65,803.0	1,052.4	3,248.0	65.0
1968	67,897.0	1,105.8	3,350.0	65.8
1969	70,384.0	1,145.4	3,575.0	68.7
1970	70,880.0	1,184.6	3,588.0	70.4
1971	71,214.0	1,217.7	3,704.0	73.6
1972	73,675.0	1,262.4	3,889.0	83.5
1973	76,790.0	1,311.4	4,097.0	92.0
1974	78,265.0	1,336.0	4,020.0	89.1
1975	76,945.0	1,347.6	3,525.0	73.1
1976	79,382.0	1,365.4	3,576.0	71.4
1977	82,471.0	1,404.3	3,851.0	73.5
1978	86,697.0	1,519.8	4,229.0	85.2
1979	89,823.0	1,602.0	4,463.0	90.4
1980	90,406.0	1,637.9	4,346.0	85.9
1981	91,156.0	1,657.8	4,188.0	81.6
1982	89,566.0	1,645.8	3,905.0	71.7
1983	90,200.0	1,698.6	3,948.0	81.9
1984	94,496.0	1,805.4	4,383.0	96.8
1985	97,519.0	1,906.3	4,673.0	110.9
1986	99,525.0	1,987.9	4,816.0	121.9
1987	102,200.0	2,080.1	4,967.0	131.6
1988	105,584.0	2,167.2	5,125.0	141.4
1989	108,581.0	2,230.9	5,300.0	148.5

SOURCE: Department of Employment Services in cooperation with the Virginia Employment Commission, the Maryland Department of Economic and Employment Development, and the U.S. Bureau of Labor Statistics. Non-Agricultural Wage & Salary Employment by Place of Work.

Unemployment Rates

Metropolitan Area

In February 1990, the Bureau of Labor Statistics ranked 257 Metropolitan Statistical Areas (MSAs) by preliminary unemployment rates. The Washington Area's jobless rate was 2.8 percent in February, up from the 2.7 percent recorded in January. This was the fourth lowest jobless rate of the 257 areas reporting. A year ago, the Washington Area rate was 2.9 percent.

Comparing the Washington Area with other large metropolitan areas nationwide, the Washington Area's rate at 2.8 percent was the lowest of all the major metropolitan areas. Low unemployment rates for February were also recorded in San Francisco—3.0 percent, Minneapolis-St. Paul, Oakland, and San Diego each 3.7 percent, and Nashville, Phoenix, and Milwaukee each 3.8 percent.

The Richmond-Petersburg Area, 110 miles to the south of Washington, posted a February jobless rate of 3.9 percent up from 3.6 percent reported in January. A year ago, the rate was also 3.9 percent.

The Baltimore Area, only 35 miles north of Washington, recorded a February jobless rate of 4.3 percent down from 4.5 percent posted in January. A year ago, the Baltimore rate was 4.5 percent.

Of the 257 metropolitan areas for which February data are available, 34 had over-the-year decreases in their unemployment rate of 1 percentage point or more, and 52 had increases of that magnitude. Forty one areas had rates at or below 4 percent, and 58 had rates of 7 percent or higher.

Unemployment Rates in Selected Major Metropolitan Statistical Areas

MSA	February	
	1990*	1989
1. Washington, D.C.	2.8	2.9
2. San Francisco, CA	3.0	3.4
3. Oakland, CA	3.7	4.5
4. Minneapolis-St. Paul, MN	3.7	3.9
5. San Diego, CA	3.7	4.0
6. Milwaukee, WI	3.8	3.9
7. Nashville, TN	3.8	3.8
8. Phoenix, AR	3.8	4.6
9. Richmond-Petersburg, VA	3.9	3.9
10. Seattle, WA	4.1	5.0
11. Salt Lake City, UT	4.2	4.8
12. Portland, OR	4.3	4.9
13. Baltimore, MD	4.3	4.5
14. Indianapolis, IN	4.3	4.5
15. Memphis, TN	4.4	4.8
16. Atlanta, GA	4.6	4.6
17. Cincinnati, OH	4.7	4.5
18. Boston, MA	4.7	3.2
19. Sacramento, CA	4.7	5.6
20. Philadelphia, PA	4.9	3.9
21. Kansas City, MO	5.0	5.8
22. Jackson, MS	5.0	5.4
23. Newark, NJ	5.1	4.5
24. Columbus, OH	5.2	4.7
25. Oklahoma City, OK	5.3	5.3
26. Cleveland, OH	5.3	5.0
27. Birmingham, AL	5.3	5.8
28. Dallas, TX	5.5	5.7
29. Los Angeles, CA	5.5	4.4
30. Buffalo, NY	5.6	6.9
31. Houston, TX	5.7	6.3
32. Louisville, KY	5.7	6.0
33. Denver, CO	5.7	6.4
34. Dayton, OH	6.0	4.8
35. New York, NY	6.0	5.3
36. Chicago, IL	6.0	5.4
37. Montgomery, AL	6.0	6.2
38. Gary, IN	6.0	6.4
39. Pittsburgh, PA	6.1	5.3
40. St. Louis, MO	6.1	6.0
41. Miami, FL	6.2	5.6
42. New Orleans, LA	6.3	8.0
43. Detroit, MI	7.8	6.5

*Preliminary unemployment rates.

States

When the District of Columbia (with a February preliminary unemployment rate of 5.6 percent) was ranked with the 50 States, the District held the twenty-fifth position. This was ten notches below January's standing. Virginia's rate at 4.4 percent was down, from 4.6 percent recorded in January. Maryland's rate was also down, falling from 4.1 percent to 3.9 percent. Virginia and Maryland have two of the seven lowest jobless rates among the 51 jurisdictions. This month, Virginia and Maryland ranked forty-fifth and forty-eighth, respectively, in the standings. A year ago, the rates in Virginia and Maryland were 4.5 percent and 4.2 percent, respectively.

Seven states experienced over-the-year declines of 1 percentage point or more in their unemployment rate. The largest reduction was in Louisiana (2.4 percentage point). Seven states had over-the-year increases of more than 1 percentage point. The largest were in the New England states—Rhode Island (3.6 points), New Hampshire (2.1 points), Massachusetts (1.9 points), and Connecticut (1.7 points), followed by Pennsylvania (1.4 points) and Delaware and Michigan (both 1.3 points).

February unemployment rates were at or below 4 percent in five states—Nebraska (2.8 percent), Hawaii (3.1 percent), Maryland and North Carolina (both 3.9 percent), and South Dakota (4.0 percent). Unemployment rates were 7 percent or higher in 10 states, including Alaska (8.8 percent), West Virginia (8.4 percent), and Michigan (8.1 percent).

Cities

In comparison with the 25 selected central cities, the District of Columbia (with a February preliminary rate of 5.6 percent) had the seventh lowest jobless rate. This was three notches above the position held last month. The average unemployment rate of all 26 cities edged down from 6.9 percent in January to 6.8 percent in February. A year ago, the rate was 6.6 percent.

Eight cities had rates of 6 percent or below. From lowest to highest, the cities were: San Francisco—3.6 percent, Salt Lake City—4.6 percent, Milwaukee—4.8 percent, Boston—4.9 percent, Columbus—5.0 percent, Cincinnati—5.5 percent, and the District of Columbia and Pittsburgh both 5.6 percent.

As in January, both Gary and Detroit were in the double-digit column in February. Gary's rate at 10.3 percent was up from 10.1 percent recorded in January. This was the second time in twelve months that Gary has been a double digiter. Detroit's rate edged downward in February, falling from 12.0 percent to 11.1 percent. Detroit still has the highest jobless rate of the 26 selected central cities. A year ago, Gary's rate was 10.7 percent, while Detroit's rate was 9.5 percent.

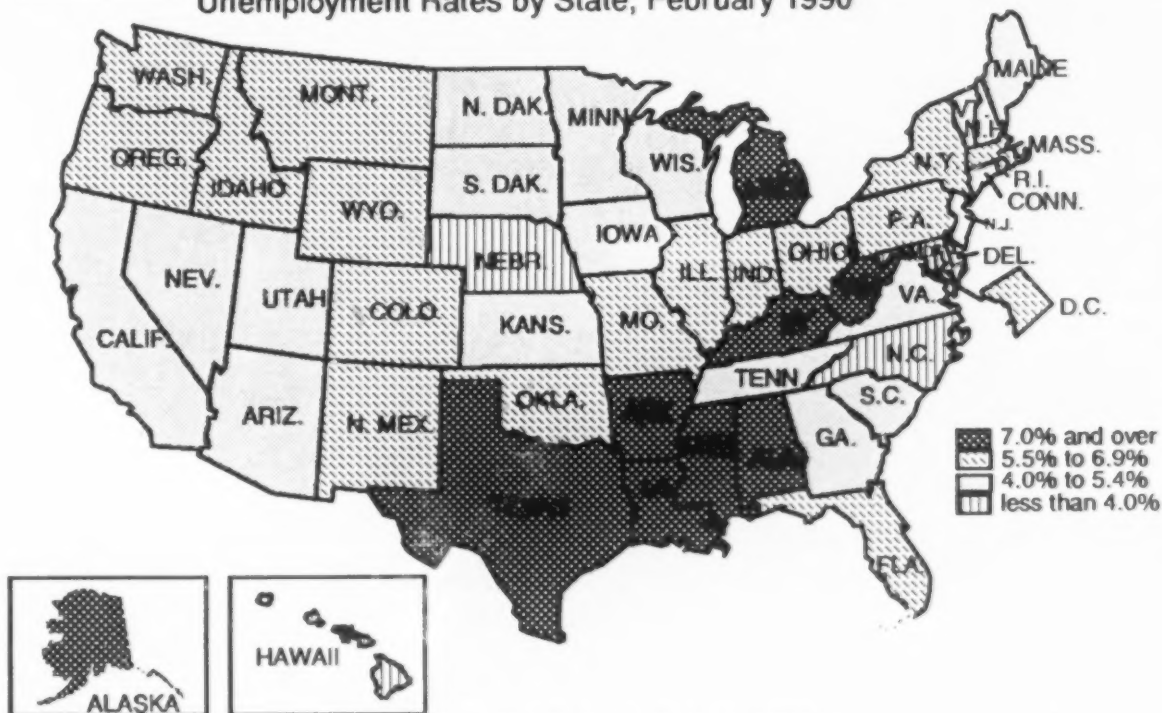
Of the 26 selected central cities, only eleven reported declines in joblessness over the year. **On the other hand, fifteen posted increases in unemployment.** The unemployment rates among the 26 central cities have been edging upward for the last seven or eight months. The largest increases were reported in Detroit (2.4 percent), Boston (1.4 percent), and Philadelphia (1.1 percent). The largest declines in joblessness were 1.9 percent in New Orleans and 1.8 percent in Buffalo.

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Unemployment Rates by State, February 1990



Unemployment Rates in Selected Cities

	February	
	1990*	1989
1. San Francisco, CA	3.6	4.2
2. Salt Lake City, UT	4.6	5.3
3. Milwaukee, WI	4.8	4.9
4. Boston, MA	4.9	3.5
5. Columbus, OH	5.0	4.8
6. Cincinnati, OH	5.5	5.3
7. District of Columbia	5.6	5.3
8. Pittsburgh, PA	5.6	4.9
9. Houston, TX	6.2	6.7
10. Philadelphia, PA	6.2	5.1
11. Los Angeles, CA	6.2	5.0
12. Dallas, TX	6.4	6.7
13. Atlanta, GA	6.4	6.9
14. New Orleans, LA	6.4	8.3
15. New York, NY	6.5	5.6
16. Chicago, IL	7.5	6.7
17. Miami, FL	7.6	6.9
18. Buffalo, NY	7.9	9.7
19. Baltimore, MD	6.6	7.0
20. Birmingham, AL	7.2	7.9
21. Cleveland, OH	8.1	7.6
22. St. Louis, MO	8.3	8.1
23. Dayton, OH	8.5	7.1
24. Newark, NJ	9.8	9.0
25. Gary, IN	10.3	10.7
26. Detroit, MI	11.1	9.5

*Preliminary unemployment rates.

The Washington, D.C. Area Consumer Price Index

The Consumer Price Index for All Urban Consumers (CPI-U) for the Washington, D.C. Metropolitan Statistical Area rose 1.4 percent during the 2 months ended in March, to a level of 133.8 (1982-84=100). **For the 12-month period ended in March, the CPI-U rose 6.1 percent.** The Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) rose 1.4 percent from January to March. The March level of 132.9 (1982-84=100) was 5.8 percent higher than the index in March 1989.

The 1.4 percent increase in the CPI-U from January to March follows an advance of 1.1 percent in the 2 months ended in January. Sharp turnarounds in the indexes for apparel and upkeep and entertainment were largely responsible for the acceleration. Prices decelerated for most other major categories of consumer spending.

The index for apparel and upkeep rose 10.7 percent from January to March, following a decrease of 8.2 percent in the preceding 2-month period. The sharp price increase reflected the introduction of spring and summer apparel, particularly, women's apparel, which accounted for more than half of the increase in the index.

Entertainment costs rose 2.6 percent, during the 2 months ended in March, compared with a decline of 0.8 percent from November to January 1990. Sharp increases in admission charges accounted for most of the increase.

The housing index rose 0.5 percent from January to March. Within the housing component, shelter costs rose 0.9 percent, reflecting increases of 2.1 and 0.2 percent in renters' and homeowners' costs, respectively.

The index for food and beverages increased 1.2 percent, from January to March, following an advance of 3.1 percent in the preceding 2 months. Grocery store food prices rose 1.2 percent after advancing 5.8 percent in the 2-month period ended in January. All major food groups contributed to the moderation; particularly the index

for fruits and vegetables, which had risen sharply in the prior 2-months.

Among other categories of consumer spending, medical care costs rose 1.7 percent, compared with an increase of 3.8 percent from November to January. Smaller increases were recorded for most medical care services. Transportation costs decreased 0.3 percent as a result of lower prices for new vehicles.

Comparing the local CPI-U with the U.S. city average, since January the prices of goods and services tended to accelerate more rapidly locally than nationally. Prices tended to increase more rapidly locally in food and beverage, entertainment, other goods and services, and energy. On the other hand, prices tended to increase more rapidly nationally in housing and apparel and upkeep. Price increases in transportation and medical care were just about equal.

Washington, D.C. Area Consumer Price Index (All Urban Consumers—CPI-U)^{a/}

	Percent Change		
	Mar. 1990	2 months Ago	Year Ago
All Items			
U.S.	128.7	+1.0	+5.2
Washington Area	133.8	+1.4	+6.1
Expenditure Category			
Food & Beverage	133.3	+1.2	+7.2
Housing	134.8	+0.5	+5.6
Apparel & Upkeep	141.9	+4.6	+10.7
Transportation	117.1	-0.3	+4.9
Medical Care	157.9	+1.7	+9.6
Entertainment	131.1	+2.6	+4.1
Other Goods & Services	162.4	+1.1	+10.4
Special Index:			
Energy ^{b/}	96.6	+0.4	+6.2

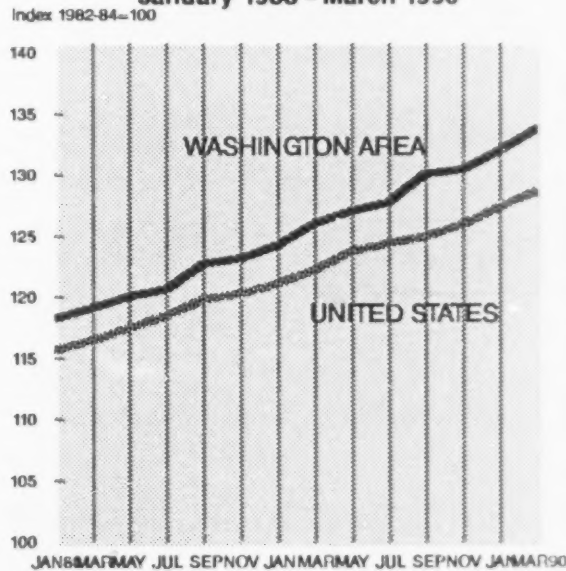
a/ 1982-84=100, except as noted.

b/ June 1978=100

SOURCE: U.S. Department of Labor, Bureau of Labor Statistics; table prepared by the Department of Employment Services, Labor Market Information and Research Staff.

**Consumer Price Index (CPI-U)
The United States &
Washington Area**

January 1988 - March 1990



UI Activities March 1990

Claims for unemployment compensation benefits in March 1990 totalled 2,900 from former workers in the city and others who use our services in the national network of unemployment compensation systems. The March level of initial claims dropped 1.0 percent below the workload in February. Compared to March of 1989, the current month's claims increased 4.1 percent.

The number of weeks of unemployment claimed during March amounted to 36,350, while the number actually compensated totalled 35,210. These levels were 6 and 8 percent, respectively, above last month, but 5 percent below the same month last year.

As expected, the outlay for benefits rose from last month somewhat commensurate with the weeks compensated for benefits. Also, the average weekly payout rose \$1.40 over the month. This increase (from \$200.60 to \$202.00) is a natural outgrowth of the change in the maximum

weekly benefit amount from \$283 to \$293 effective January 1990, and the accompanying higher overall benefit scale. All claimants who qualified on the higher scale since January and those who recently exhausted from the lower scale effective prior to January, combined to make for the increase in the average weekly benefit amount. The total outlay in March was \$7.1 million compared to \$5.5 million last month.

The workload activity in the first quarter of 1990 rose from the previous quarter. Initial claims and weeks compensated rose 7 and 17 percent, respectively. Also with the workload activity, outlay was on the upswing, rising from \$18.4 million in the fourth quarter of 1989 to \$21.8 million in the first quarter of 1990. The rise in workload activity in the first calendar quarter of the year is a normal seasonal phenomenon, brought on by a surge of filers because of the change-of-base period in the first month of each calendar quarter, and from workers laid off after

Continued from page 19

the Christmas holiday peak period. Also during this quarter there was the added "seasonal" factor of extremely cold and snowy weather conditions at the end of December and the first weeks of January which caused layoffs and claims from outdoor activity/industries such as in the National Park Service and construction.

The average weekly benefit amount during the fourth quarter 1989 was \$199 compared to \$201 in the first quarter of 1990. The first quarter rise was also expected as explained earlier. The following tables outline the details of monthly and quarterly movements in workload and benefit outlays.

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We're here to help YOU. Call the Employer Services Center at 639-1601, or 1602 and ask about POSITIVE RECRUITMENT. It works!

Department of Employment Services
Government of the
District of Columbia
Marion Barry Jr., Mayor

**Selected Unemployment Insurance Benefit Statistics
(Regular Programs)
District of Columbia
March 1990**

	% Change From				
	Mar. 1990	Feb. 1990	Mar. 1989	Feb. 1990	Mar. 1989
State UI Programs/					
Initial Claims Taken	2,734	2,788	2,595	-1.9	+5.4
Weeks of Unemployment Claimed	34,219	32,284	35,247	+6.0	-2.9
Weeks of Unemployment Compensated	33,051	30,510	33,951	+8.3	-2.7
Total Benefits Paid	\$6,623,602	\$6,077,138	\$6,583,756	+9.0	+0.6
Average Weekly Benefit Payment	\$200.41	\$199.19	\$193.92	+0.6	+3.3
Number of First Payments	1,662	1,672	1,730	-0.6	-3.9
Number of Final Payments	766	733	787	+4.5	-2.7
Total Beneficiaries	9,231	9,294	9,298	-0.7	-0.7
Federal Programs/					
Initial Claims Taken	87	73	129	+19.2	-32.6
Weeks of Unemployment Claimed	1,899	1,734	2,545	+9.5	-25.4
Weeks of Unemployment Compensated	1,990	1,847	2,772	+7.7	-28.2
Total Benefits Paid	\$455,024	\$413,000	\$627,232	+10.2	-27.5
Average Weekly Benefit Payment	\$228.66	\$223.61	\$226.27	+2.3	+1.1
Number of First Payments	91	83	189	+9.6	-51.9
Number of Final Payments	76	42	60	+81.0	+26.7
Total Beneficiaries	546	528	772	+3.4	-29.3
Ex-Servicepersons Programc/					
Initial Claims Taken	47	33	30	+42.4	+56.7
Weeks of Unemployment Claimed	236	217	296	+8.8	-20.3
Weeks of Unemployment Compensated	168	177	221	-5.1	-24.0
Total Benefits Paid	\$33,569	\$36,243	\$41,917	-7.4	-19.9
Average Weekly Benefit Payment	\$199.82	\$204.76	\$189.67	-2.4	+5.4
Number of First Payments	20	21	20	-4.8	+0.0
Number of Final Payments	6	18	12	-66.7	-50.0
Total Beneficiaries	58	60	65	-3.3	-10.8
Total—All Programs					
Initial Claims Taken	2,868	2,894	2,754	-0.9	+4.1
Weeks of Unemployment Claimed	36,354	34,235	38,088	+6.2	-4.6
Weeks of Unemployment Compensated	35,209	32,534	36,944	+8.2	-4.7
Total Benefits Paid	\$7,112,195	\$6,526,381	\$7,252,905	+9.0	-1.9
Average Weekly Benefit Payment	\$202.00	\$200.60	\$196.32	+0.7	+2.9
Number of First Payments	1,773	1,776	1,939	-0.2	-8.6
Number of Final Payments	848	793	859	+6.9	-1.3
Total Beneficiaries	9,835	9,882	10,135	-0.5	-3.0

a Includes joint claims with Unemployment Compensation for Federal Employees (UCFE) and or Unemployment Compensation for Ex-Servicepersons (UCX)

b Includes joint claims with Unemployment Compensation for Ex-Servicepersons (UCX)

c No joint claims

**Unemployment Insurance Activities
Selected Quarters, 1989 and 1990
District of Columbia**

	1st Qtr 1990	4th Qtr 1989	1st Qtr 1989	Percent Change From 4th Qtr 1989	Percent Change From 1st Qtr 1989
Initial Claims	9,887	9,244	9,577	+6.9	+3.2
Weeks Compensated	108,514	92,772	106,742	+17.0	+1.7
Total Benefit Outlay	\$21,826,953	\$18,483,167	\$20,573,926	+18.1	+6.1
Average Weekly Benefit Amount	\$201.14	\$199.23	\$192.74	+1.0	+4.4

Hours and Earnings in Manufacturing

Total Manufacturing Average Weekly Earnings in the Metropolitan Area for March 1990 increased \$10.43. Average Weekly Hours rose .4 hour, as Average Hourly Earnings increased 14 cents.

In the Durable Goods Sector, Stone, Clay and Glass Products reflects an increase in Weekly Earnings and Weekly Hours of \$20.67 and 2.6, respectively. This was due to more business.

In the Non-Durable Goods Sector, Printing and Publishing Weekly Earnings increased \$7.02. The Hourly Earnings rose 32 cents, an increase in the proportion of higher paid employees was the cause of the increase. Other Non-Durable Goods had more overtime worked which caused Weekly Earnings to rise \$27.04 and Weekly Hours to rise 2.6 hours. Hourly Earnings increased 5 cents.

**Earnings of Production Workers in Manufacturing
Washington Metropolitan Area
March 1990**

	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Mar. 1990	Feb. 1990	Mar. 1989	Mar. 1990	Feb. 1990	Mar. 1989	Mar. 1990	Feb. 1990	Mar. 1989
Total Manufacturing	489.74	479.31	455.86	39.4	39.0	39.4	12.43	12.29	11.57
Durable Goods	509.75	500.07	466.35	42.8	42.2	41.9	11.91	11.85	11.13
Stone Clay & Glass Products	545.31	524.64	486.87	48.3	45.7	42.3	11.29	11.48	11.51
Electric Machinery, Equipment & Supplies	440.67	445.46	413.31	41.3	41.4	39.4	10.67	10.76	10.49
Other Durable Goods	521.20	510.41	478.40	42.1	41.7	42.6	12.38	12.24	11.23
Non-Durable Goods	473.80	463.55	446.48	36.7	36.5	37.3	12.91	12.70	11.97
Food & Kindred Products	424.20	423.15	415.30	40.4	40.3	41.2	10.50	10.50	10.08
Printing & Publishing	493.84	486.82	471.80	34.9	35.2	35.5	14.15	13.83	13.29
Other Non-Durable Goods	411.20	384.16	370.94	42.7	40.1	42.2	9.63	9.58	8.79
Total Production Workers			Mar. 1990 39,700		Feb. 1990 40,000			Mar. 1989 42,200	

NOTE: Data reflects revision to the 1989 Benchmark.

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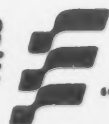
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